

The background is a vibrant blue gradient. It features a network of white lines connecting various sized blue dots, suggesting a digital or neural network. In the upper right quadrant, there is a stylized, layered representation of a brain, rendered in shades of blue and cyan, with a textured, almost crystalline appearance. The overall aesthetic is futuristic and tech-oriented.

# Why you should have an intelligent digital mailroom

A Docbyte white paper

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# Take the First Hurdle™ in the digitization of your organization

## 1 The first hurdle

Digital transformation is all the buzz. Organizations that take their customers seriously – and really, they should – are very aware of the necessity to ‘transform’. However, just like with any other process, you need to start by successfully taking the first hurdle. Almost always, your first obstacle is the mailroom. Moving to a digital mailroom can **improve your operational excellence, increasing your company's and your customer's responsiveness.**

Yet, what is a digital mailroom to your business? Is it an all-encompassing solution for an entire organization or should it address specific business issues such as mortgage application processing in the financial world or claims process in the insurance environment? Defining this for your company is a key first step.

## 2 Customer is king

Once you've determined the purpose of your digital mailroom, it's time to see which parts of the process can be automated. A key element in this is customer communication and how rapidly you can respond. Businesses are built around their customers and without them success is impossible. An easy to understand equation. To be successful you need your customers to keep coming back to do even more business, so keeping them happy is essential.

**Customers have a plethora of ways to communicate:** write, fill in forms via the web or via their smartphone. Moreover, they are in the driving seat and expect you to deal with their issues quickly, efficiently and immediately – whatever the original format of the correspondence. If they have to wait, hear nothing, come back to you, repeat the process, hear nothing again, have to explain it to another department, etc. Well, then you're in danger of losing that customer very, very fast. If you still have an old school mailroom you increase that risk manifold. However, digitization coupled with automation can prove an answer through the ability to improve your operational efficiency.

## 3 The mailroom bottleneck

Whatever the format, **all organizations are confronted with incoming correspondence.** Without efficient methods of processing, the mailroom can quickly become a bottleneck. For sure, a lot of classical mailrooms are perfectly organized, but can they cope with the exponential increase in communication methods and the client's expectation of immediate and efficient response? Sadly, the answer is often no.

While companies do invest in IT that makes their business more efficient, the mailroom often gets forgotten in these upgrades. Manual mail processing and distribution keeps soldiering on. However, the most expensive, state-of-the-art systems – be they CRM, accountancy or order processing – that were implemented to increase efficiency and streamline workflows, will never reach their full potential when you're handling incoming data in an old-fashioned manner.

The mailroom as the central hub, is **the key to get the handling of incoming data on the same level as your company's other systems.** In essence, it's a crucial element to ensure the success of the other departments. If information is held up, no one can use it to perform effectively or efficiently. Hence, digitization and intelligently automating this part of your organization might be the most important investment you'll ever make.

### 3.1 The traditional mailroom: starting point of organizational inefficiency

In a traditional mailroom, **incoming correspondence is analyzed individually to determine the correct destination, person or department.** Sometimes the mail is classified again at the destination where it is distributed again to the right contact, who will then manually copy information into a specific system. Because how else are you going to use that state-of-the-art and very efficient software that you invested in heavily? If you look at the journey of one piece of correspondence, you can see that it is long and unnecessarily uses a multitude of resources, creating additional costs. Sounds familiar?

### 3.2 Lack of Uniformity

Emails with or without attachments, paper letters, web forms, faxes, and more, can all be classified as correspondence. However, **they do not enter the organization in the same way.** Paper-based mail most of the time ends up in the mailroom, but electronic-based information is sent directly to the right contact person.

It is also possible that **different entry-points are used for the same business critical information**. Let's say a complaints letter arrives by post and via a parallel email. The email is immediately processed via the CRM system while the paper-one has to go through the tedious process described above. The response to email can be monitored and can be evaluated against the KPIs of the company. Subsequently, you are able to improve upon it. This is a lot more difficult for the paper one as it is stuck in the mailroom and the relevant department depends on the efficiency of the mailroom. It therefore cannot be accountable for not making its KPIs as the control was out of its hands. Lack of uniformity hampers best practice.

Moreover, it also inhibits the organization to prioritize its mail flow. Different type of documents ending up on one pile make this virtually impossible. For instance, the complaint letter in the mailroom can be stuck between invoices, applications, change of address requests, and the like. **A common basis is essential to apply sound business rules and avoid unhappy customers** that will be contra-productive for your business success.

## 4 The intelligent digital mailroom: what is it really?

An intelligent digital mailroom **automatically processes all incoming documentation** through clever use of intelligent technology such as artificial intelligence (AI) and machine learning (ML). A very important little word in this description is ALL. A truly efficient mailroom solution has to cater for all incoming sources. So, one could argue that a *unified platform solution* where the same interoperable principles are used across the mailroom, is ideal. The original format – be it paper, email, fax, web-form, or something else – is irrelevant as is the document type such as purchase order, complaint, vendor invoice, and request. When the same solution handles them all, **your processes gain efficiency and you get the ability to effortlessly expand the technology across the business** as your needs evolve.

So, your ideal mailroom automation solution takes incoming communications from a heavy, outdated, error-prone and costly manual sorting to a system where all information is captured at the point of entry and streamlined through the organization. Data is extracted through artificial intelligence and exported to the relevant business systems. No delays, but immediate action and seamless integration with all your business applications.

## 4.1 Why intelligent mailroom automation?

### Centralize all incoming channels

Regardless of the format or origin, our mailroom makes sure **every piece of information coming into your organization is processed** and directed to the right workflow or person.

### Accelerate response and decision times

Thorough automation with AI gets the information to the right person **quicker** and in a uniform way. With no waiting time or delays, you can respond faster than ever before.

### Improve customer satisfaction and experience

Fast response times, clear traceability, and a process that fits a digital age **improve the quality of your service**, resulting in happy customers.

### Streamline information circulation

Enables straight-through processing for standard tasks: from capture to response

### Reduce operational cost

Digitization and automation through software diminishes administrative work. Moreover, you save on storage, archiving, maintenance and transportation costs.

### Ensure data tracking

Unified data enables improved workflows, increased efficiency and the possibility to monitor and adapt KPI's.

### Secure information

Quickly understand the nature of incoming information and apply **the required levels of security** accordingly.

### Ensure high-quality data

Let algorithms handle data extraction and classification. This **eliminates human error** and ensures the quality of your data.

## Turn the unstructured into structured

From emails to a plethora of document formats, **a lot of information flowing into your organization is unstructured**. A mailroom that uses smart technology, such as machine learning and pattern recognition, structures it for you before it enters your company.

## Quickly find the right documents

Automatic tagging and sorting, on top of digitizing all incoming documents and information, makes it easy to find the right files. **Reducing document retrieval times** impacts your costs and makes compliance with regulations easier.

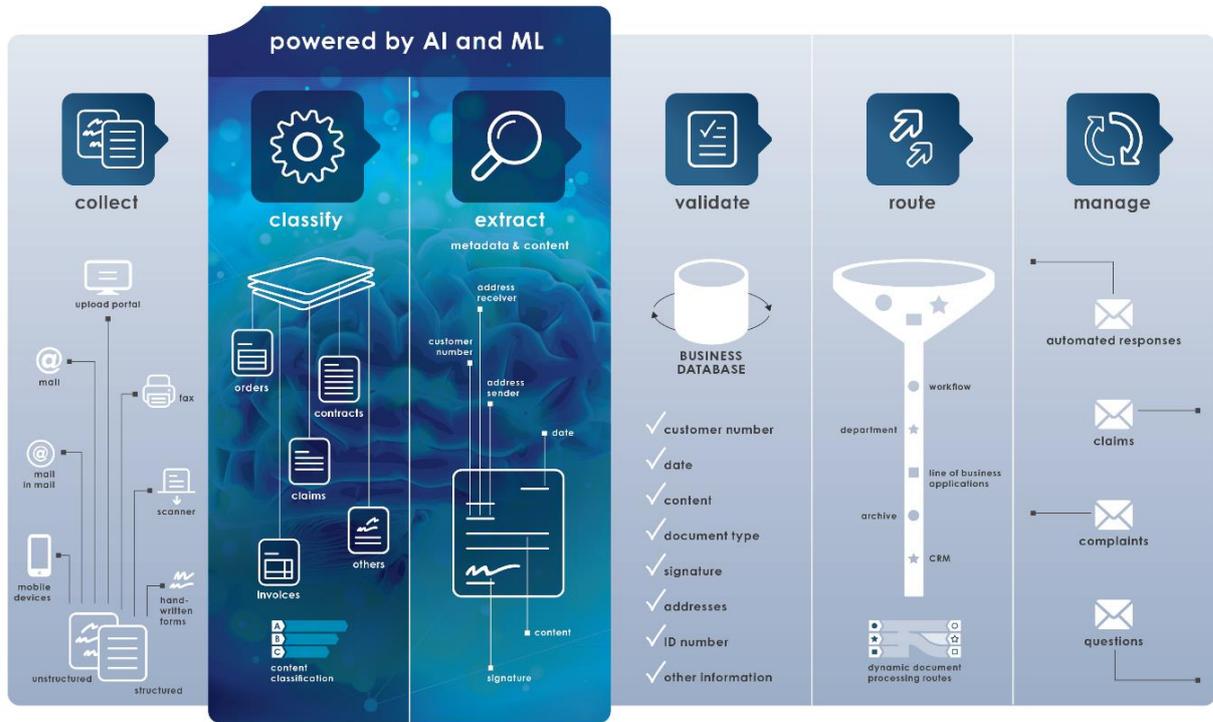
## Compliance without headaches

No human error, clear traceability and automatic application of security levels, they're just a few ways a digital mailroom helps ensure compliance. Moreover, **most of it happens automatically so you don't have to worry anymore** and can focus on your business.

## 4.2 The next gen digital mailroom

With the emergence of **artificial intelligence**, the intelligent digital mailroom also saw the light of day. Adding AI and machine learning is most powerful in the classification and extraction steps. A lot of work that was previously impossible to automate can now be handled by specifically trained algorithms. For instance, **pattern recognition** allows for template-independent processing. It's just one of many ways we can upgrade the 'old' digital mailroom to the next level.

# docbyte digital mailroom solution



## 5 KEY QUESTIONS

So, you're ready to automate your mailroom with smart tech. We're happy you're enthusiastic. Before you dive in, however, you should prepare by answering these questions:

- Do you really know what types and formats of information are coming into your organization and from where?
- Do you have records of how many documents arrive daily in your organization? Be it in electronic or paper form? Is an additional audit necessary?
- How many people are employed receiving, handling, sorting, processing and dispatching documents, both internally and externally?
- Is your workload growing, fluctuating or is it stable?
- How long does it take for documents to reach their destination, calculated as from their initial entry?

- Do you prioritize content? How? If not, is critical information processed late?
- Do documents reach the right recipient?
- Are there many mistakes? Is human error a huge factor in manual classification. Is the security of critical data guaranteed?
- How many man-hours are lost in rectifying mistakes?
- Is your experienced staff losing time and growing frustration to correct errors?

## 6 KEY CONSIDERATIONS

### 6.1 Classification

All organizations receive information in the following formats:

- **Unstructured:** these can be handwritten files, but also documents that do not follow any set structure, template or format.
- **Semi-structured:** documents with predictable elements, but in unpredictable locations.
- **Structured:** these files follow a predefined structure or template, making data types and location easy to predict.

Incoming correspondence can relate to one or more specific departments such as finance, HR, customer service, marketing, or be market-specific such as insurance claim, bank account, and more. An automated digital mailroom must be capable of capturing, reading and correctly routing all these different documents types and formats. As the gateway it has a huge impact on the subsequent workflow.

The solution, therefore, has to be able to **understand all the data in the document** to avoid errors and the subsequent time-consuming correcting of these mistakes. To be as accurate as possible, it has to be able to examine the format and other visual elements such as color, signatures and barcodes. Moreover, it needs to analyse the actual content.

Different methods are available to automate this classification, but your ideal system handles both structured and unstructured documents in order to reduce implementation time and ensure continued flexibility of the mailroom. Especially artificial intelligence and machine learning prove to be invaluable to **automate more**

**than ever before.** Adding intelligent technologies is the way to go to create the next generation of digital mailrooms.

### 6.1.1 Becoming template-independent

In many cases, the only way to overcome the problem of unstructured information flowing into your organization, is to have smart tech like machine learning structure it. Pattern recognition is an incredibly powerful tool. In many companies and tools, changes to templates result in many hours of programming or retraining models to adjust business rules and applications. That's a considerable time and cost investment just to keep your tools working the way they should. With pattern recognition, **a template can change overnight and the algorithms will still be able to extract the right information.**

Consequently, becoming template-independent has many benefits. The effort required to take into account a new layout can be invested in innovation and improving the customer experience and service. That's cutting costs while increasing your ability to make successful sales. At Docbyte, we can get a project online with multiple document types spanning several hundred layouts in record time and achieve over 95 percent accuracy.

## 6.2 Extraction

Recognizing data is key for an effective digital mailroom. **Correctly extracting and delivering information to the right recipient** is key for the success of your automation effort. How you do this is therefore of the utmost importance as it will affect the accuracy of the process. Moreover, the quality of the extraction is directly related to the amount of human intervention and number of corrections down the line. For maximum effectiveness and accuracy, it's vital to employ artificial intelligence and machine learning algorithms.

A solution that automatically captures the data and validates it against existing records in the internal and external databases, will provide the best flow of information. To accurately recognize and extract data, a digital mailroom solution should implement **intelligent capture** (IC) and utilize the following techniques:

- **OCR:** Optical Character Recognition
- **ICR:** Intelligent Character Recognition
- **OMR:** Optical Mark Recognition
- **Barcode scanning**

In its most basic form, IC combines artificial intelligence with optical character recognition (OCR). The latter identifies the text location in all types of documents and returns the text – in digitized form if the original was a paper document. When you add classification algorithms or other forms of AI to OCR to also sort the returned text, it becomes **intelligent character recognition** (ICR). Next to this ICR, your ideal mailroom should also implement optical mark recognitions (OMR) – the recognition of marks on documents, for instance, a check mark on a form – and barcode scanning. You should carefully look at a solution that can give you the tools to extract the data as accurate as possible.

## 6.3 Distribution

Distribution to the right department, person, back-office system, or the like, is the whole point of your new automated digital mailroom. That process should be effortless and flexible. Setting rules for distribution should be easy to set up. You should look for a system where you can **set priorities based on type and content of the documents**.

Moreover, to ensure the security of your data you should look for a product with an effective and **easy-to-use authorization and validation system**. Many industries operate with strict rules for mail and who can look at what.

## 6.4 Reporting, auditing and analytics

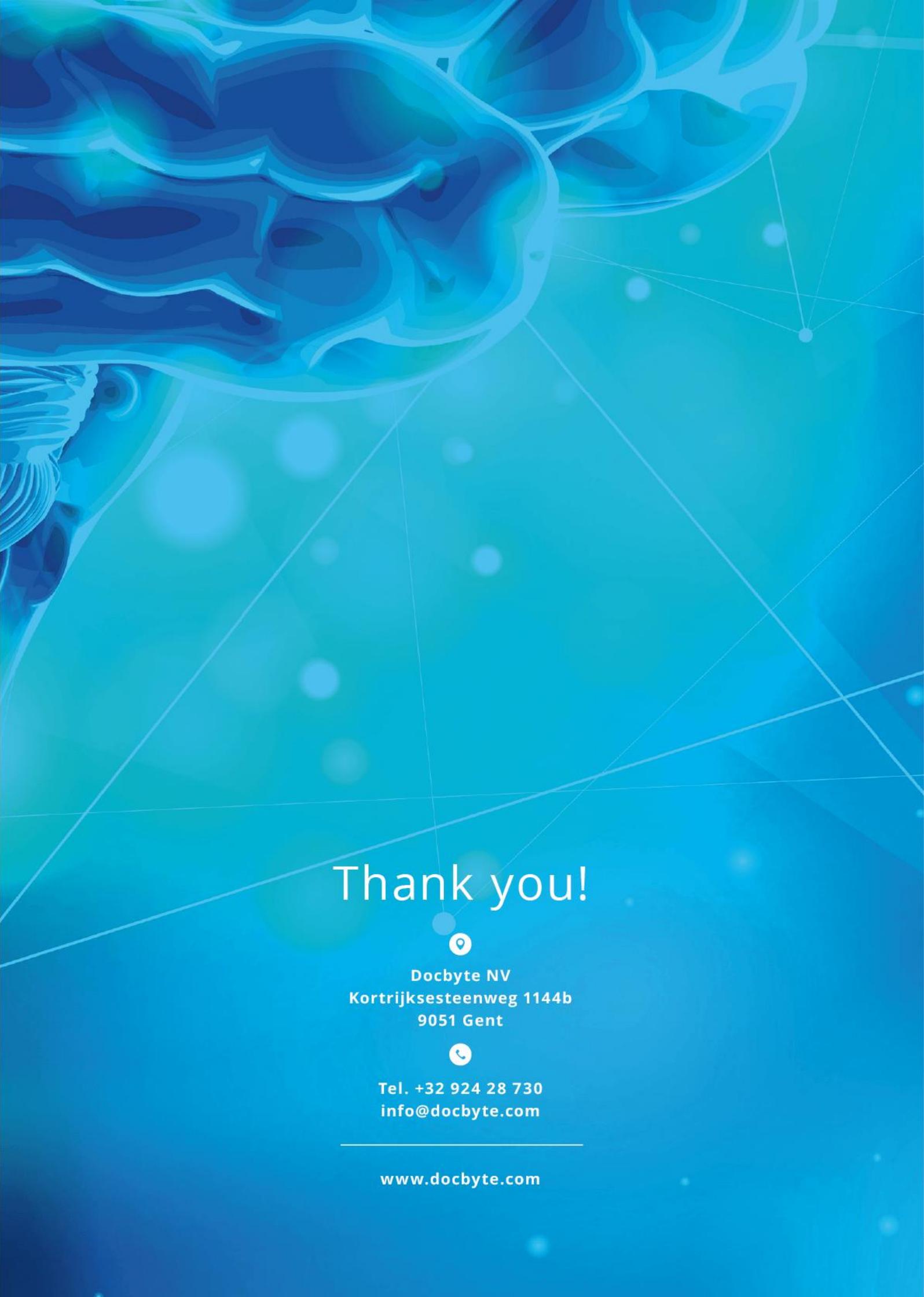
Intelligent mailroom automation enables effective reporting, auditing and analytics, as everything is tracked from entry to exit. This information can be linked to specific KPIs and provide the basis for constant improvement of response times and service levels. Losing information becomes part of the past as the auditing trail is easily tracked and transparent. So, **look for a comprehensive solution that meets your needs now and in the future**.

## 7 CONCLUSION

A digital mailroom that's automated with intelligent technology enables an organization to process all its documents and have them delivered to the right recipient fast and reliably. The benefits are obvious as the phase-out of manual sorting – costly, slow and prone to error – is providing a new opportunity to increase productivity, **a more efficient handling of requests, increased transparency and traceability, and a reduction of costs.**

Embarking upon this journey, however, needs some preparation and a realistic view of your needs now but certainly in the future. Spending some time on gathering your thoughts and **making a list of your requirements will ensure that the implementation with the right solution provider is a success.** On top of making sure the full effect of your digital mailroom will be tangible in the shortest amount of time and never makes you look back.

Are you keen on improving your own operational excellence? Would you like to offer your customers a better experience and improve your responsiveness to your inquiries? Then digitally transform your mailroom with artificial intelligence and machine learning. Contact our experts at [hello@docbyte.com](mailto:hello@docbyte.com) to talk about your needs.



# Thank you!



Docbyte NV  
Kortrijksesteenweg 1144b  
9051 Gent



Tel. +32 924 28 730  
info@docbyte.com

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